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## Czech Republic

### Product Brief

### Seafood

**2002**

Approved by:

**Paul Spencer-MacGregor**

**U.S. Embassy**

Prepared by:

Petra Chot•borská

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**Report Highlights:** Fish consumption in the Czech Republic is 5.5 kg/person and it is growing slightly. In the last few years, speciality seafood restaurants have appeared on the market and new hypermarkets carrying a range of fish products have opened. Fish types typically imported from the U.S. are: frozen fish fillets, salmon, dogfish, herring, mackerel and crab. There is market potential for lobster, scallops and other seafood. The biggest competitors are China, Denmark, Norway, and Canada.

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Includes PSD changes: No  
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## Product Brief - Fish and Seafood

### SECTION I. MARKET OVERVIEW

- The size of the Czech market for fish is about 60,000 MT, with over 5.5 kg consumption per capita. Consumption should continue to rise along with incomes (and EU membership). By way of comparison, fish consumption in neighboring Germany is 15 kg per capita and the EU average is 17 kg.
- The Czech Republic, is landlocked and farms only freshwater fish (carp, trout, pike, bream etc.); saltwater fish and seafood are imported.
- Freshwater fish has a long tradition (500 years) and its share of total fish consumption is around 65%.
- Until the beginning of the 1990s, freshwater fish had a 90 - 95% share; seafood consumption rose along with the opening of the economy, and has risen further along with the increase in tourism, hotels, speciality restaurants and new retail chains.
- 90% of imported saltwater fish and seafood is frozen.

Advantages	Challenges
Czech consumers, especially young and urban, are getting used to new types of food including seafood; the availability of fish along with various cookbooks in the retail chains (especially hypermarkets) contributes to the increasing demand for fish.	More conservative consumers will not change their eating habits and will continue to eat only typical Czech cuisine (pork/beef, dumplings, sauces).
Hotels, restaurants, and institutions (HRI) have good potential - solvent clients, a growing number of speciality restaurants.	Strong competition from other countries, the EU and other European countries - Europe will continue to supply the Czech market with fresh chilled fish and seafood.
A stronger Czech currency (up by 7-8% in the past two months) makes imported products cheaper, which along with increased disposable income, should help fish sales.	Higher prices for saltwater fish and seafood compared to poultry, beef, pork, and freshwater fish.

### SECTION II. MARKET SECTOR OPPORTUNITIES AND THREATS

#### Entry Strategy

- Fish is imported by several Czech companies (most of them are owned by a foreign company based in a country with sea ports - e.g. Denmark).
- The importers have warehouses and freezers in the Czech Republic from where they distribute their products to retail and HRI sectors.
- Fresh fish is imported 3-4 times per week from a huge fresh fish market near Paris; live fish (e.g. Maine lobster) is imported by plane.

- Expensive restaurants have several suppliers.
- U.S. exporters may receive a list of Czech fish and seafood importers by contacting the FAS Prague office at the address below.

### Market Size, Structure, Trends

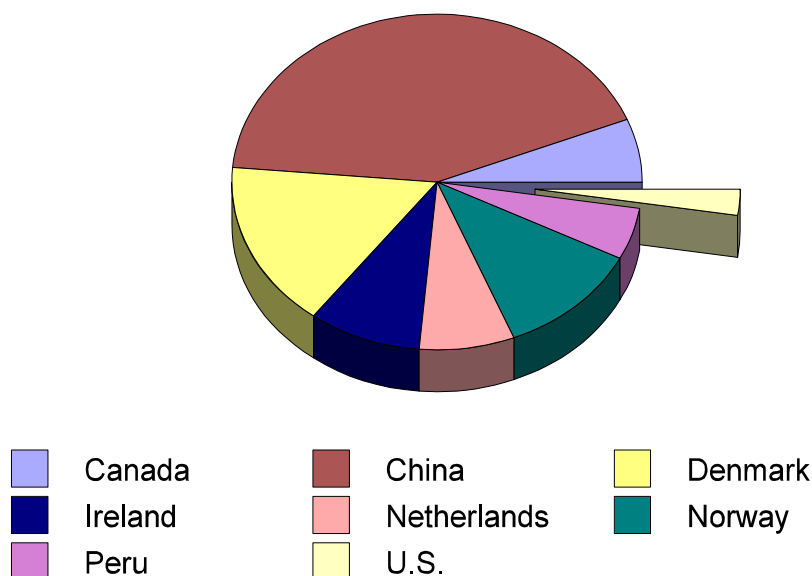
- The Czech Republic is landlocked and has no fishing fleet. Import data for saltwater fish serves as a good proxy for total consumption.
- The Czech Republic exports only freshwater fish, mainly carp and trout.

	IMPORTS		EXPORTS	
	1,000 MT	mil. \$	1,000 MT	mil. \$
1999	30	38	9	27
2000	32	38	11	25
2001	32	46	12	30

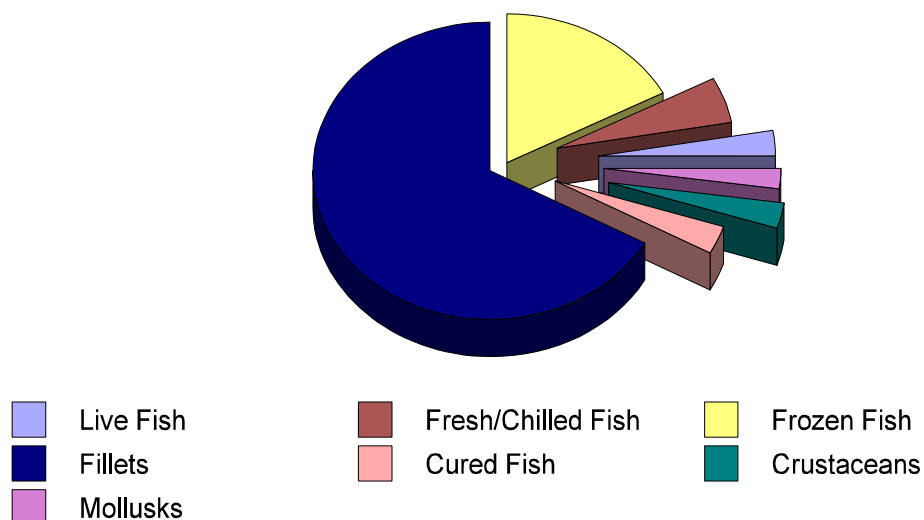
### Import Statistics

Total fish and seafood imports in 2001 were 32,000 MT (\$46 mil.), out of which 541 MT (\$0.9 mil.) was from the U.S. (2% market share by value). Total exports last year were 12,400 MT (\$30 mil.).

Import of Fish and Seafood by Country (in 2001, total \$ 46 mil.)



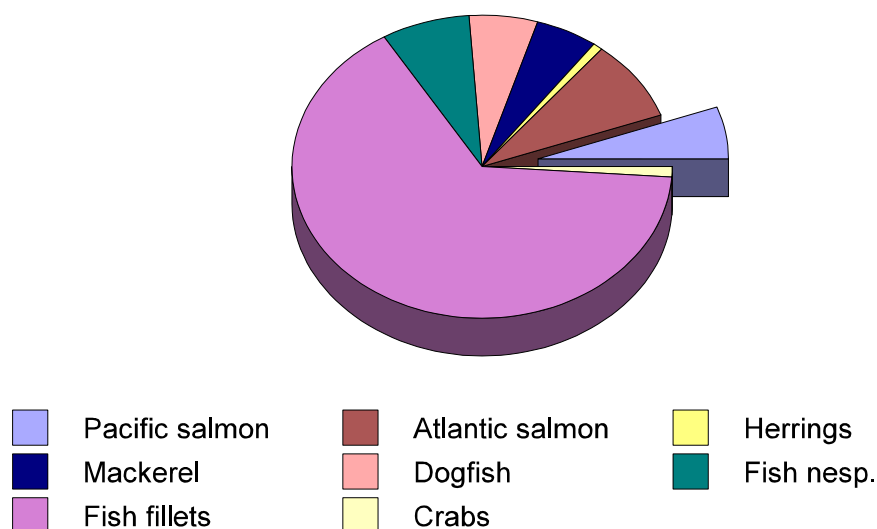
### Czech Fish and Seafood Imports - 2001 (total \$46 mil.)



### Major suppliers of various kinds of fish:

Fresh pacific salmon:	Norway (355 MT), France (54 MT), Denmark (44 MT)
Frozen pacific salmon:	China (119 MT), Denmark (32 MT), U.S. (31 MT)
Frozen halibut:	Canada (13 MT), Norway (1 MT)
Lobsters not frozen:	France (5 MT), Netherlands (1 MT), Denmark (1 MT), Canada (0.7 MT)
Frozen lobsters:	Denmark (2 MT)
Scallops frozen:	France (5.8 MT), Ukraine (3 MT), Germany (2.5 MT)

### Fish imports from the U.S. in MT in 2001



The following table shows imports of various saltwater fish and seafood (all frozen) in the past three years. The numbers in the brackets are imports from the U.S.

	1999		2000		2001	
Product	MT	1,000 USD	MT	1,000 USD	MT	1,000 USD
Salmon, Pacific (030310)	116 (48)	323 (84)	101 (38)	214 (71)	214 (31)	458 (47)
Halibut (030331)	1 (0)	6 (0)	4 (0)	13 (0)	15 (0)	30 (0)
Herrings (030350)	1,538 (0)	799 (0)	1,542 (15)	764 (11)	2,485 (4)	1,683 (3)
Mackerel (030371)	5,216 (0)	3,286 (0)	5,442 (7)	3,473 (5)	4,717 (29)	3,493 (21)
Dogfish and other sharks (030375)	136 (0)	258 (0)	133 (36)	212 (67)	123 (33)	234 (88)
Livers and roes (030380)	57 (18)	116 (64)	26 (18)	78 (63)	0.5 (0)	2 (0)
Fish fillets (030420)	13,732 (88)	18,169 (161)	18,252 (40)	21,234 (59)	17,791 (356)	27,121 (601)

#### Consumption trends - saltwater fish/seafood

- About 90% of all imported saltwater fish and seafood is frozen, the remaining 10% is fresh and live fish - both fresh and frozen fish are available year round.
- Mackerel and herring are very popular. Both are imported frozen and further processed in the Czech Republic and sold as chilled products - fish salads (made from herring with mayonnaise); mackerel is sold smoked or people buy it for summer grilling
- The highest imports are frozen fish fillets (from cod and hake); salmon is also becoming more and more popular.
- Flatfish (plaice) has been substituted by halibut (a more expensive fish).
- Fresh chilled and live fish are available in state-of-the-art hypermarkets along with cookbooks and videotapes on how to prepare fish and seafood .

#### Consumption trends - freshwater fish

- Fried carp fillets with potato salad is a traditional Christmas dish (like turkey for Thanksgiving).
- Throughout the year trout (baked/grilled) is the most popular freshwater fish.
- Consumption of fish increases (outside of the Christmas season) in the spring, which is a result of lighter diet that people adopt in order to lose weight after winter.

### **Distribution Channels**

- Fish is imported by several companies (some of the biggest ones are owned by Danish parent companies, e.g. Nowaco).
- The importers have their own distribution trucks, warehouses and supply retail and HRI sectors. Importers are also wholesalers and distributors.
- In rural areas smaller companies buy fish from the largest importers.

### **SECTION III. COSTS AND PRICES**

- VAT for most fish products is 5%, except for more expensive ones such as lobster, shrimp etc. , these products have a 22% VAT.
- Prices of fish vary throughout the year - freshwater fish and frozen fish fillets are among the cheapest products; the most expensive include live lobster and crab, seafood and some saltwater fish

### **SECTION IV. MARKET ACCESS**

- The Czech State Veterinary Administration (SVA) has a set of requirements for imports of veterinary products. Fish import rules can be found (in English) on the SVA's webpage: <http://svs.aquasoft.cz> (obchodovani s veterinarnim zbozim, then click on English, import conditions, other countries - CR, products, each form has a specific number)
- Foreign veterinarian must stamp the import licence, which says that all the products listed are in compliance with the import conditions (there is a number from the form with conditions)

### **SECTION V. KEY CONTACTS AND FURTHER INFORMATION**

#### **Post information:**

**FAS Prague Office**  
Contact: Ms. Petra Chot•borská  
Title: Agricultural Specialist

Address: American Embassy Prague, Trziste 15, 118 01 Praha 1, Czech Republic  
Tel: +420-2-5753-1170  
Fax: +420-2-5753-1173  
E-mail: [choteborska@fas.usda.gov](mailto:choteborska@fas.usda.gov)  
URL: [www.usembassy.cz](http://www.usembassy.cz)  
[www.fas.usda.gov](http://www.fas.usda.gov)

**Government organizations:****State Veterinary Administration**

Contact: Dr. Josef Holejsovsky  
Title: Director  
Address: Tesnov 17, 117 05 Praha 1, Czech Republic  
Phone: +420-2-2181-2530  
Fax: +420-2-2231-8282  
E-mail: [red@svs.aquasoft.cz](mailto:red@svs.aquasoft.cz)  
URL: <http://svs.aquasoft.cz>

**Czech Agricultural and Food Inspection**

Contact: Mr. Martin Klanica  
Title: Vice Director  
Address: Kvetna 15, 603 00 Brno, Czech Republic  
Phone: +420-5-4354-0213  
Fax: +420-5-4354-0210  
E-mail: [klanica@czpi.cz](mailto:klanica@czpi.cz)  
URL: [www.czpi.cz](http://www.czpi.cz)

(Exchange rate: May 2002: 1 USD = 34 CZK)